How to best create a compelling Power BI report

Power BI is becoming a widely used BI product. More and more companies are adopting Power BI as the tool of choice. Power BI offers tons and features and capabilities to help derive the best insights from the data. However, a report will be as impactful as it was designed. As a self-service tool, Power BI allows users to be up and running in a few clicks. However, creating a professional report, which will be used in an enterprise environment, is a different ball game. Power BI developers need to follow a robust design process to deliver an impactful report.

Why it is crucial to follow report design principles
- Power BI report should be able to provide clear information to the audience
- Easy to use
- Engage users

If any of these things are missing, you will lose the audience. They will stop using the report and go back to using the old ways of getting the information.

How should you design an influential Power BI report

1. Know your audience
Understand who will be the final recipients of the report. The report design will change based on the target end-user. Who are you serving?
- Executive stakeholders who are looking for summary KPI to make business decisions
- Mid-level operational managers who get the work done and are looking to monitor the metrics and take some corrective actions
- Business Analysts who are looking for data discovery and not know the question in advance
- End-user who are looking to view the information to understand the state of the affairs

2. What problem will the report address?
Whether the report will be used for making business decisions? Will it depict the current state of business metrics? Will it show how important KPIs are trending? Will it be used for data discovery?

3. How the report will be delivered or how the consumers will consume the report
- Web browser using Power BI Service
- Mobile user
- Web application using Power BI embedded

4. Design the correct layout using the user interface and user experience.
What filters or slicers are needed? Where to place them? The number of visuals on the page. Size, color, font, spacing, margins, etc. are very important to make a dashboard appealing. The Navigation path of drill down, drill through, page navigation, and bookmarks should be consistent, recognizable, and intuitive.

5. Data Shaping or modeling

Data preparation before starting to create visual is vital for an impactful report. Data modeling has a direct impact on report performance. It also affects the overall effectiveness. Relationships between entities used, calculated columns, calculated measures, DAX expressions have a significant effect on the report.

6. Selection of report visuals

Type of visual used in a report play one of the most critical roles in overall effectiveness. Each visual has a specific use case(s). The selection of a report visual should be made based on the kind of analysis needed. It should not be based on "it looks cool and sexy."

7. Power BI additional features and capabilities

Power BI provides many additional feature options like conditional formatting, what-if analysis, row-level security, bookmarks, actions. They should be used for specific use cases. Choosing the feature based on the purpose, audience and delivery platform should be kept on mind before designing

8. Design report wireframes

Design the wireframes before starting the development. Make sure you get the right layout and user navigation that brings the story behind the data

9. Branding

Apply the organization's colors, fonts, logos, images, etc. Follow the corporate branding guidelines

10. Testing and Deployment

- Test the report for navigation, user interface, and user experience
- Make necessary changes based on how a user would perceive the report
- Deploy the report and get it in the user's hands.
- Keep track of user adoption.

In summary, following the basic design process and keeping things simple will democratize your Power BI development